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ABSTRACT

Training managers from Fortune 500 companies were sent standardized instruments for the assessment of the psychological, interpersonal, motivational, and demographic makeup of excellent trainers. These training managers were asked to describe, by completing standardized instruments, the best trainers in their organizations. Results were analyzed and summarized to provide a profile of excellent trainers. Data from 204 out of 500 instruments mailed were analyzed using t-test, correlational (Pearson-r for variables with ordinal, interval, and ratio scales, and point bi-serial for dichotomous variables), and one-way analysis of variance tests of significance. The most important finding was that excellent trainers were, as a group, significantly different from the general population on 20 out of the 21 personal and psychological characteristics; "extroverted" was the exception. Gender difference was not found to be significant. As a group, the excellent trainers rated significantly above the population average in the interpersonal style dimensions of caring, sociable, and assertive. Age appeared to influence the nature of excellent trainers. Older trainers tended to exhibit less aggressive behavior; younger trainers were characterized as more robust and competitive. (21 references) (YLB)

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Working Papers

# CHARACTERISTICS OF EXCELLENT TRAINERS IN BUSINESS AND INDUSTRY: A PSYCHOLOGICAL, INTERPERSONAL, MOTIVATIONAL, AND DEMOGRAPHIC PROFILE

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## EXECUTIVE SUMMARY

Little information is available regarding the personal and psychological makeup of excellent trainers. However, such information can provide valuable insights. The profile can help us gain a better understanding of their overall character, can provide a potential role model for those interested in careers in private sector training, and may prove useful in the selection of personnel for training and development positions.

Training managers from Fortune 500 companies were sent standardized instruments for the assessment of psychological, interpersonal, motivational, and demographic makeup of excellent trainers. The results generated four major points of interest.

First, excellent trainers are different from the general population on 20 of the 21 personal and psychological characteristics measured. Excellent trainers appear to possess certain characteristics which contribute to their effectiveness.

Second, gender difference was not found to be significant. Both males and females possess the traits that appear to contribute to excellence. However, in contrast to the general population, excellent female trainers were found to be more competitive than excellent male trainers.

Third, excellent trainers can be described as caring, warm, sociable, and assertive people. Their comfortable and positive nature contributes to their success at work and in general. Such an interpersonal style is reflected in their effectiveness as humanistic managers of instruction as well as team players.

Fourth, age appears to influence the nature of excellent trainers. Consistent with the general population, older trainers tend to exhibit less aggressive behavior. Younger trainers are characterized as more robust and competitive. Both styles are excellent in their own right, but different in significant ways.

# CHARACTERISTICS OF EXCELLENT TRAINERS IN BUSINESS AND INDUSTRY:

## A Psychological, Interpersonal, Motivational, and Demographic Profile

### Introduction

The knowledge, skills, and roles required for success as a vocational educator working in business and industry have been well documented. Without question, high knowledge and skill levels are implicit factors in the formula for trainer excellence. However, even those trainers with a repository of knowledge about effective teaching are not always identified as excellent. We intuitively see that there is more than a catalog of knowledge and skills which defines the excellent trainer.

There have been numerous studies conducted that address the issue of teacher personality and effectiveness in the public school setting. But, there is a relative dearth of information regarding the personal and psychological makeup of excellent private sector trainers. Such information will help us to gain a better understanding of excellent trainers' overall character, can provide a potential role model for those interested in careers in private sector training, and may prove useful in the selection of personnel for training and development positions.

### Purpose of the Study

Stereotypes are not generally acceptable nor accurate indicators of what is required to succeed in a given specialty. However, the profile presented in this paper is based on a more objective analysis of specific traits. In many professions, it is obvious that certain personality traits will be more or less necessary in order to function successfully in that job. The control of fear and the ability to think quickly and act decisively in a situation may be germane to some occupations but may not be necessary in an occupation where the job requires introspection, data reduction and analysis.

The purpose of this paper is to present findings of a study to identify the personality traits associated with the excellent trainer. More specifically, a psychological, motivational, and demographic profile of the excellent trainer in business and industry was developed.

### Method

Training managers who were assumed to have knowledge of the requirements and characteristics of successful training, responsibility for evaluating performance of trainers, and ability to identify successful trainers in their organizations were selected to participate in the study. These training managers were asked to describe, by completing standardized instruments, the best trainers in their organizations. Results were analyzed and summarized to provide the excellent trainer profile.

#### Sample

The respondent population for this study was defined as all managers in Fortune 500 companies who have responsibility for the direction and evaluation of trainers. The 1989 ASTD Membership Directory was used to identify individuals who had titles of training manager, vice president of human resources, training supervisor, or similar titles. Although titles can be misleading, these people were selected based on the assumption that it was likely they would be involved in the evaluation of trainers. This pool was then

narrowed by cross-referencing with the list of Fortune 500 companies; these companies were selected because they reflect large and successful firms in the United States. After identifying managers who fit the above criteria, a random sample of five hundred were selected for participation in this survey.

**Instrumentation**

The instrument was constructed to focus on describing the demographic and psychological characteristics of excellent trainers in the private sector. A draft of the instrument and cover letter was submitted to a panel of experts who specialize in human resource development, training evaluation, and survey research at the University of Illinois to obtain reactions and suggestions regarding demographic items and instrument layout. The instrument was divided into three discrete sections based on the data being collected.

The first section focused on background information of the excellent trainer. The instrument asked for information on the trainer's age, gender education level, degree type, years with the company, years in training and development, years in their current position, and their promotional path. The second and third sections of the instrument were standardized psychological instruments.

The two following sections describe two separate instruments, the Adult Personality Inventory and Spectrum I. Both instruments were used to create model profiles (decision models) of the excellent trainers. In these tests the respondent makes a number of paired judgments regarding which trait is more essential to the position for which the model is being constructed. For this study, respondents were asked to select which of the paired traits more accurately described their selected excellent trainer. A model of the excellent trainer was developed which was based on the identification of a number of superior individuals by an equally large number of independent judges. A brief discussion of validation of each instrument follows. Additional construction and validation data concerning these instruments is available through MetriTech as well as in test review literature such as Mental Measurements Yearbook, Tests, and others (Bolton, 1985).

Section two was the decision model version of the SPECTRUM-I instrument (Braskamp and Maehr, 1987). This instrument provides a measure of four basic motivational factors: accomplishment, recognition, power, and affiliation. The median reliability coefficient for SPECTRUM-I survey scales is .82. Norms are based on a national sample of over one thousand adults tested in 1983 or later. The four scales measured by SPECTRUM-I are best interpreted as the personal values people consider important and worthwhile in their lives. They were empirically developed by factor analysis, but they correspond in many ways to dimensions identified in other studies of basic human and work values (Maehr and Braskamp, 1986).

Section three of the instrument asked participants to complete the decision model version of the Adult Personality Inventory (API) (Krug, 1985). The validity of the API lies in its ability to measure a set of sixteen traits that form the basis of an extensive theory of personality forwarded by Cattell and his associates in the 1940s and of a test, the 16PF, developed on the basis of that theory (Cattell, Eber, and Tatsuoka, 1970). With more than two thousand citations in the professional literature supporting that these traits help to predict a broad spectrum of human behavior, the 16PF is one of the most extensively researched instruments currently in use. However, the 16PF was not without problems, and a number of derivative instruments have been developed which address the shortcomings of the 16PF. The API is one of those derivative instruments.

According to Krug (1990), the API differs from the 16PF in the way the results are reported. Instead of using the standard sixteen scales, the API reports along twenty-one dimensions which reflect seven personal characteristics, eight interpersonal orientations, and six career preferences. The scales for the seven personal characteristics (extroverted, adjusted, tough-minded, independent, disciplined, creative, enterprising) are similar to second order trait scales found in the 16PF (Krug & Johns, 1986). The first five of these traits are similar to the structure of personality agreed upon by many theorists (Costa & McCrae, 1985; Goldberg, 1981; Norman, 1965). The eight scales corresponding to interpersonal styles (caring, adapting, withdrawn, submissive, uncaring, non-conforming, sociable, assertive) are drawn from comparisons between the trait systems of Cattell and Murray. The six scales for career choice, job satisfaction and life-style preferences (practical, scientific, aesthetic, social, competitive, structured) are based on a large scale discriminant analysis of people in a wide variety of occupations. This set of scales has been observed to overlap the scales in the Holland taxonomy (Ahadi, 1990).

**Data Analysis**

The instruments were analyzed in regard to a total of thirty-three descriptive variables used to define the characteristics of the excellent trainer. Of these thirty-three variables, eight were demographic, and the remainder were psychological in nature. The data were coded and entered into the MetriTech program for evaluating the API/SPECTRUM instruments. The resulting data file was then linked to SPSS-PC for t-test, correlational (Pearson-r for variables with ordinal, interval, and ratio scales, and point bi-serial for dichotomous variables) and one way analysis of variance tests of significance.

The psychological variables were analyzed, and the sample mean scores were compared to the general population means using the t-test of mean differences. The demographic variables were used to obtain a frequency analysis of those specific characteristics of the excellent trainers. They were also used to perform and analyze selected supplementary correlational variance operations across the psychological variables. Meaningful and statistically significant results of these analyses are reported here to illustrate specific trends or diversity found in the sample of excellent trainers.

The instrumentation used allowed the construction of an objective profile based on the observations of a relatively large number of judges. The paired comparison format results in a series of judgments regarding the relative importance of various traits. For example, if respondents repeatedly select characteristic "A" over characteristics "B," "C," and "D," this is taken to mean that characteristic "A" is more important than the others in describing the personality and motivational orientation of the excellent trainers.

It is important to note that the use of the decision model version of the two instruments, although probably more appropriate for the outside rater, places some constraints on the resulting profile which do not exist when the regular (self-report) questionnaires are used. For example, although an individual could theoretically score high on all scales, the paired comparison version does not permit this. For one scale to be judged highly important, other scales must be judged to be of lesser importance. Nevertheless, the paired comparisons of the decision model versions of the two instruments are more appropriate for collecting evaluations by outside raters who are not in a position to answer the self-report questionnaire items reliably about another person.

## Results

Of the five hundred instruments mailed, 204 usable instruments were returned. The return rate of approximately forty-one percent is higher than is normally obtained from business and industry representatives. The results of the data analysis follow and are

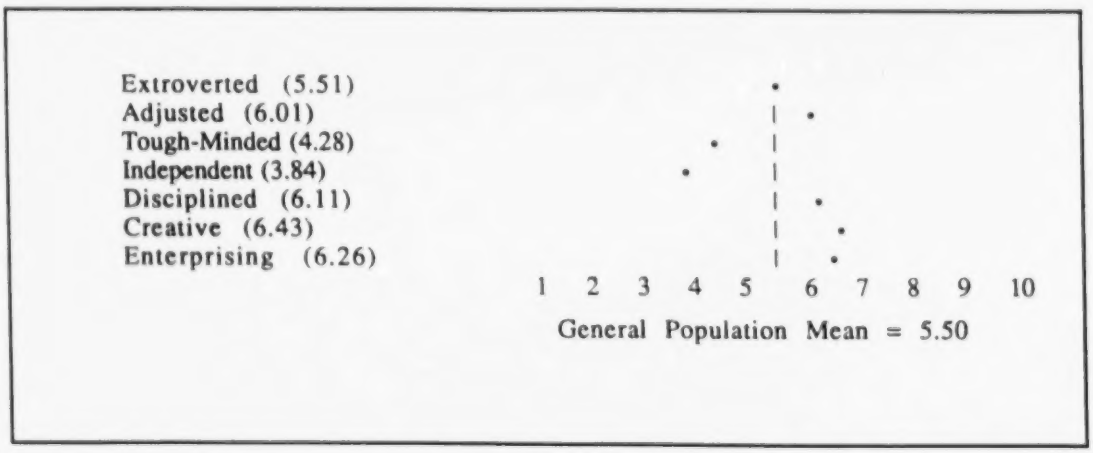
presented in reference to each of the thirty-three variables defined by the protocol. In a few cases, frequencies do not total 204 due to missing data. The first section focuses on the demographic characteristics of the excellent trainers. This is followed by sections which highlight the psychological profile of the excellent trainers. These sections cover the personal, interpersonal, career factors, and motivational characteristics of the excellent trainers.

## Demographic Characteristics

The demographic characteristics investigated in this study were gender, age, educational level, educational field, tenure with company, number of years in current position, number of years in the training and development field, and opportunity for career advancement. The respondents chose 68% male and 32% female excellent trainers. Age of the excellent trainers ranged from 25 to 65 years, with the average being 40 years. Most excellent trainers possessed either a Master's Degree (43.6%) or a Bachelor's Degree (40.7%). A majority of these degrees were earned in business and management (24.1%), education (22.1%), liberal arts (11.3%), engineering (11.3%), and human resource development (10.8%). The excellent trainers averaged 9 years (range = 1 to 36 years) with their current companies and 3 years (range = 1 to 11) in their current positions. The average number of years in training and development was 8 with a range of 1 to 25 years. Lastly, for most of these trainers (47.1%), promotions within training and development are possible. However, for a large number (34.8%) a transfer out of training and development is necessary for advancement.

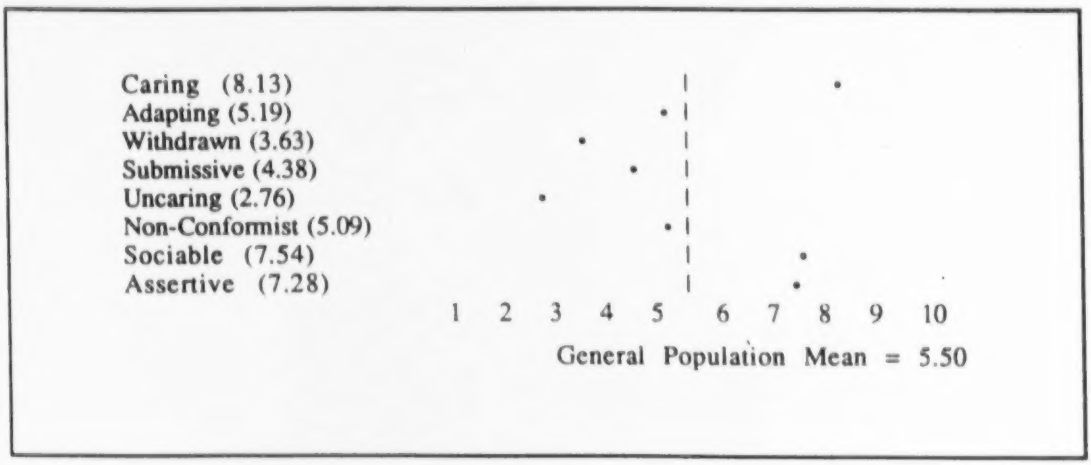
## Personal Characteristics

Excellent trainers tend to possess a significantly different personal profile from the general population on several important dimensions. As a whole, this group is stable, intuitive, self-disciplined, imaginative, and adventurous. They perform well under stressful conditions and consider themselves team players who prefer working in an ensemble setting. They are highly motivated individuals who enjoy challenge and innovation.



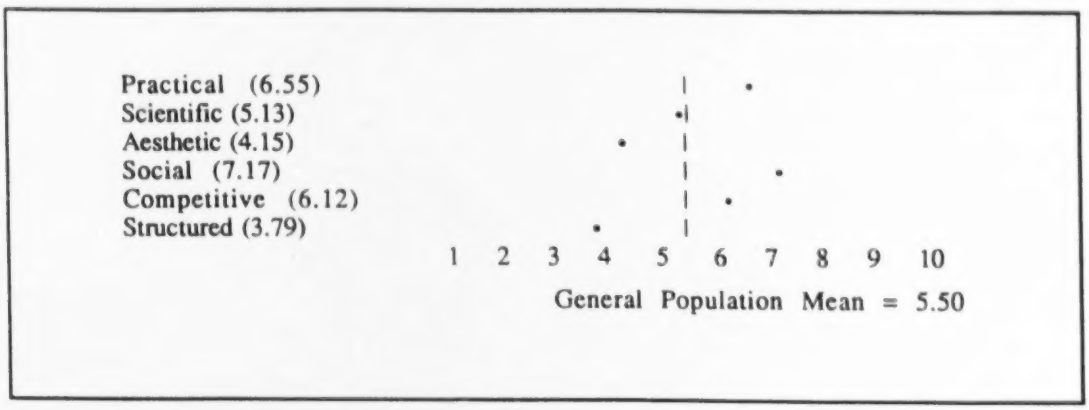
## Interpersonal Style

Excellent trainers appear to utilize certain interpersonal styles which contribute to their effectiveness. They can be described as industrious, assertive, approachable people who prefer a humanistic style of management. Given the nature of their jobs and their apparent success, one would expect them to enjoy interacting with others, to have a good deal of self-confidence and to be open and out going. In addition, younger trainers appear to be more aggressive and open to risk taking than their older, more tenured counterparts.



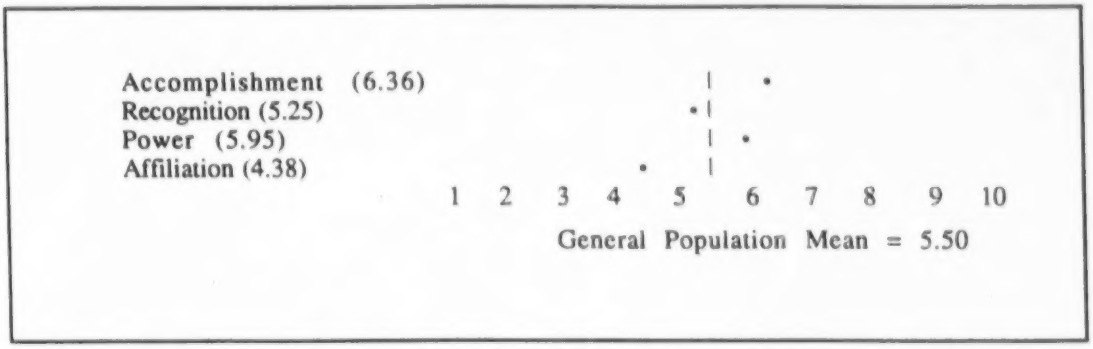

## Occupational Factors

On the average, excellent trainers tend to approach their tasks in a practical, yet creative and innovative manner. They are most comfortable in roles that involve interaction with other people, and prefer intellectually challenging assignments. Ambiguity and difficulty are welcome characteristics of their work. In addition, excellent trainers tend to be of a competitive nature, especially those who are either young or female.



**Motivational Factors**

Excellent trainers seem to be motivated be exciting, challenging work that allows for a high level of involvement. Although not essential, they prefer to receive encouragement and support for their efforts. As a whole, this group strives for leadership and receives satisfaction from competition.




**Summary and Conclusions**

The most important finding in this study is that the excellent trainers were, as a group, significantly different from the general population on all the psychological variables except for extroverted. The participants in this study have defined the personal, interpersonal, career preference, and motivational characteristics of excellent trainers. Although there were some statistically significant variations observed within the groups comprising the excellent trainer sample, as a group, the respondents have provided a profile or "decision model" that can assist in recruiting individuals with the most promise of excellence.

Perhaps just as significant is the issue, or better, non-issue of gender. One of the caveats the instruments came with was to note specific significant differences between men and women on several scales. However, only three out of twelve scales showed significant differences between men and women, and of these, one was a difference opposite to that found in the general population. The difference observed in the sample may be due to the use of third party raters instead of self-report instruments. The fact that there are no observed differences in these dimensions between men and women perceived as excellent trainers warrants mention if only to pique further investigative curiosity. Both males and females possess those traits necessary to be excellent trainers, and sex makes no difference.

The third finding of significance over and above the fact that as a group they were rated significantly above the population mean on virtually all dimensions is that the excellent trainers rated substantially above the population average in the interpersonal style dimensions of caring, sociable, and assertive. Collectively, these dimensions describe people who are warm and respond openly to other people. Additionally, they are usually seen as good humanistic managers who frequently gain control over social settings. They are good, comfortable, and positive people at work and in general. Further support for this contention were the composite scores achieved by the trainers that fell below the population average on the personal characteristics scale of independent, the interpersonal style scales of withdrawn and uncaring, and the career factor of structured. Again, it is not

surprising to find these levels in the excellent trainers. In their teaching assignments, they could not be too independent, because they are essentially filling the role of a coach on a team effort. Pulling people together (through consistent, quality training) to accomplish the organization's goals is one of the basic responsibilities of their job as an instructor. To do this they must necessarily be the type of person who is a team player while being both caring and outgoing.

Age, and the accompanying increases in tenure in the company, in training and development, and in the specific job, indicates a general moderating of more aggressive traits such as extroverted, independent, non-conformity, assertive, competitive, and power. Virtually all of these characteristics or tendencies were observed to be lower with the older trainers. As with most of the general population, the excellent trainers mellowed with age. Perhaps they can be viewed as a fine wine, aged to perfection. While the younger excellent trainers can be viewed as an aggressive wine with a robust character. Both excellent in their own right, but different in significant ways.

A tendency might be to interpret the results of this study as implying that excellent trainers are born and not made. However, such an interpretation would be a mistake. Of course all of the competencies required for success as a trainer are learned and many of the desirable interpersonal characteristics can be acquired or at least cultivated and refined.

Certainly, there is some predictive value imbedded in the results of this study. The information may be helpful in matching personality strengths to career options in training. Using this information alone as the basis for selection and retention of trainers would obviously be an error. However, making decisions solely on the basis of a trainer's knowledge and skills, without considering the interpersonal and psychological dimensions associated with the training arena, would also be a mistake. Identification of requisite knowledge and skills is an important part of describing and understanding the nature of effective trainers. However, it is not the complete story.

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